

Tenth Account Current and Report of Conservator and Petition for  
Allowance of Compensation to Conservator and Attorney

			PUBLIC GUARDIAN, Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
			Please see petition for details.	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 3/4/16	
			Updates:	
			Recommendation:	
			File 1- Sisk	

## Probate Status Hearing Re Filing of First Account of Successor Conservator

	<b>PUBLIC GUARDIAN</b> was appointed successor conservator of the estate on 9/25/14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
	Letters issued 9/24/14.		
<b>Cont. from 120915</b>		1. <b>Need first account</b>	
<b>Aff.Sub.Wit.</b>	I'isha Cooley, daughter, was appointed successor conservator of the person on 9/25/14.		
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>	Minute order dated 9/25/14 set this status hearing for the filing of the first account of successor conservator.		
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>	<b>Status Report filed on 2/19/16</b> states the Public Guardian's office is currently short staffed, because one of the support staff suddenly retired for medical reasons. The person who prepares the necessary documents for the accounts is currently covering both her duties and the duties of the other staff member who retired. Furthermore, there have been a large number of accounts set for status hearings, which makes it even harder for her to get to all of them.		
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>	Therefore, it is respectfully requested that the next status hearing for this matter be set no sooner than 90 days from the date of this status hearing.		<b>Reviewed by:</b> KT
<b>Order</b>			<b>Reviewed on:</b> 3/3/16
<b>Aff. Posting</b>		<b>Updates:</b>	
<b>Status Rpt</b>		<b>Recommendation:</b>	
<b>UCCJEA</b>		<b>File 2 – Cooley</b>	
<b>Citation</b>			
<b>FTB Notice</b>			

Attorney Robert Koligian, Jr. (for Petitioner Carol R. Velasquez-Cerda)

**First and Final Account and Report of Successor Administrator and Petition  
for its Settlement, for Allowance of Commissions and Fees and for Final  
Distribution**

<b>DOD: 11/13/2007</b>		<b>CAROL R. VELASQUEZ-CERDA</b> , daughter and Successor Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> Petition does not state the account period pursuant to Probate Code § 1061(a). However, the account period presumed in this atypical case, in which the original Administrator appointed 2/26/2008 is deceased ( <b>CORA VELASQUEZ</b> , DOD 10/21/2014) and has been succeeded by Petitioner, appears to be the date of the original appointment through the date of the making of the <i>First and Final Account and Report of Successor Administrator</i> .  1. Petition does not but should indicate the source of payment of the statutory attorney fees. Proposed order finds at paragraph 3, page 3, that Petitioner is ordered to pay the attorney fees from funds of the estate; however, the estate consists solely of real property.
		<b>Account period: [2/26/2008 – 1/26/2016]</b>	
Cont. from		Accounting - <b>\$92,500.00</b>	
Aff.Sub.Wit.		Beginning POH - <b>\$92,500.00</b>	
✓	Verified	Ending POH - <b>\$92,500.00</b> (no cash)	
✓	Inventory	Administrator - <b>waives</b>	
✓	PTC	Attorney - <b>\$3,500.00</b> (less than \$3,700.00 statutory)	
✓	Not.Cred.		
Notice of Hrg		<b>Distribution pursuant to intestate succession is to:</b>	
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.		<b>ESTATE OF CORA VELASQUEZ – 50%</b> undivided interest in real property. (Note: Petition states once decedent Cora Velasquez' interest is confirmed to her, the appropriate legal action will be taken to transfer that property interest to the appropriate beneficiaries.)	
Conf. Screen			
Letters	022608; 103015		
Duties/Supp			
Objections			
Video Receipt			
CI Report			
✓	9202		
✓	Order		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
✓	FTB Notice		
<b>Reviewed by:</b> LEG <b>Reviewed on:</b> 3/3/16 <b>Updates:</b> <b>Recommendation:</b> <b>File 3- Velasquez</b>			

**First and Final Account and Report of Successor Administrator and Petition for its settlement, for Allowance of Compensation to Attorneys for Ordinary Services for Reimbursement of Costs Advanced and for Final Distribution**

<b>DOD: 12/12/06</b>		<b>WANDA FOSTER</b> , Successor Administrator with Limited IAEA with bond of \$101,635.00, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>SEE ADDITIONAL PAGES</b></u>
		<b>Account period: 12/12/06 – 1/12/16</b>	
		Accounting: \$245,700	
		Beginning POH: \$245,700	
		Ending POH: \$245,700	
		(real property, vehicle, boat)	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Administrator (Statutory): waived	
<input checked="" type="checkbox"/>	<b>Verified</b>	Attorney: \$4,021.00 (less than statutory \$7,914.00)	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Attorney (Extraordinary): \$1,185.00 (for 6.3 attorney hours @ \$250/hr and 2.6 paralegal hours @ \$100/hr in connection with trial on competing petitions)	
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		W
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>	<b>Petitioner states</b> Queen E. Jefferson and the decedent lived together as husband and wife for approx. 30 years prior to their marriage on 2/7/06. Decedent died 12/12/06 and Queen continued to reside in the home and assumed all financial obligations including mortgage, property tax, and insurance. From commencement of their relationship, Charles and Queen agreed that they would equally own the Kearny Blvd property. Even though title was held in the name of the decedent only, the joint tenancy deed attached hereto as Exhibit A supports that they had every intention that the property be bought as joint tenancy. (The attached deed is titled "Joint Tenancy Deed," but grants the property to Charles Lee Jefferson, an unmarried man, only.)	
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>	Petitioner states throughout their relationship they purchased other assets together including the 1973 Chevy Pickup and 1958 Glasscraft Pleasure Boat inventoried on the I&A. Queen performed her services as companion and housekeeper at all times relevant.	
<input checked="" type="checkbox"/>	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>	<b>Petitioner states</b> the decedent had two children, Laura Hamilton and Carrie Jefferson, who are the stepchildren of the surviving spouse, Queen E. Jefferson. Petitioner alleges that Queen E. Jefferson is entitled to succeed to the assets of the estate pursuant to Marvin v. Marvin (1976) 118C.3d 660; 134 Cal.Rptr. 815; 557 P.2d 106, and asks the Court to order distribution to the estate of Queen E. Jefferson pursuant to these facts.	
		<b>Petitioner states distribution pursuant to intestate succession is as follows:</b> Estate of Queen E. Jefferson (surviving spouse), via Petition to Determine Succession: Entire estate (real property, vehicle, boat).	
		<b>Reviewed by:</b> skc	
		<b>Reviewed on:</b> 3/3/16	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 4- Jefferson</b>	

Page 2 – NEEDS/PROBLEMS/COMMENTS: Note: See below each note for responses filed 3/7/16.

1. **There are outstanding filing fees due the Court in the total amount of \$1,075 for various petitions and objection filed by Laura Hamilton and/or Carrie Jefferson (the decedent's two daughters) dating back to 2008. Because assets valued at \$245,700 are being distributed pursuant to this petition, payment of these outstanding fees is required:**
  - \$320 Petition filed 5/8/08
  - \$320 Objection filed 6/17/08
  - \$435 Petition filed 6/19/14

**Declaration filed 3/7/16 states** the filing fees due by the decedent's daughters should have been paid by them at filing. This office never represented Laura Hamilton or Carrie Jefferson in this matter. The fact that their filing fees have remained unpaid are not under the control of this office or the Successor Administrator Wanda Foster. There are no cash assets of the estate in which to pay these filing fees. Ms. Foster personally advanced all costs of administration and has not requested reimbursement for these costs advanced.

2. **Petitioner cites authority (*Marvin v. Marvin*) re distribution to Queen E. Jefferson, or her estate, but does not describe the cited authority at all. The Court may require clarification or further points and authorities regarding the designation of the property as community property, given the date of acquisition and the date of marriage.**

**Clarification and Authorities filed 3/7/16 states** the Marvin case pertains to this situation because it holds that an unmarried co-habitant can acquire an interest acquired during cohabitation to the extent her rendition of services benefitted the other party by making it unnecessary for him to pay someone else for the services. Queen did not work outside the home. She did household work and cared for their children. Per Marvin, unmarried cohabitants can agree to:

- a. Pool earnings and accumulate property according to community property laws;
- b. Form a partnership
- c. Establish any other such relationship

Here, the parties expressly and orally agreed they would be equal owners and the property would pass to the survivor by survivorship. Per Marvin, this agreement need not be in writing. Further, the general rule is whatever rights accrue under a non-marital relationship agreement survive the parties' subsequent marriage. See *Watkins v. Watkins* (cite in declaration). The decedent and Queenie did marry on 2/7/06 after 30 years of life together in cohabitation.

3. **This estate has been open since 2008 and this accounting shows no transactions whatsoever (receipts or disbursements). The Court may require clarification.**

**Declaration filed 3/7/16 states** during administration, there were never any cash assets. All costs have been advanced by the former administrator. Therefore, there are no reported receipts or disbursements.

4. The attorney's office represented the former administrator from her appointment in 2008 until her death in 2013, but the estate was not closed timely during that time pursuant to Probate Code § 12200. As a result, competing petitions and trial on appointment of a successor administrator occurred in 2014, for which the attorney now seeks extraordinary compensation. The Court may require clarification with reference to Probate Code § 12205, which allows reduction in compensation for delay in administration that was not in the best interest of the estate.

**Declaration filed 3/7/16 states** although the statutory fees pursuant to law in this matter are \$7,914; this office has agreed to accept \$4,021. The extraordinary fees of \$1,189 were for services necessary to protect the asset of the estate to ensure that they would be distributed to the proper parties. The Court ruled in favor of Wanda Foster in the instance of being the successor administrator, and when added to the reduced fees, still totals an amount less than the statutory fees. While § 12205 provides a remedy to reduce compensation, the attorney has already realized a reduction in agreeing to accept a lesser statutory amount than what he would be entitled.

**5A Ariel Golden, Dallas Kerns, Dylan Kerns & Dwayne McCoy (GUARD/P)**  
**Case No. 09CEPR00065**

**Petitioner** English, Anita Rachell (Pro Per – Mother)

**Ex Parte Petition for Termination of Guardianship of DeWayne McCoy, Jr. (Only), In the Alternative Modification of Parenting Time (Visitation Time); and Application for Issuance of Subpoena**

		<b>ANITA R. ENGLISH</b> , mother, is petitioner.  <p style="text-align: center;"><u>Please see petition for details</u></p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note: This petition pertains to DeWayne McCoy, Jr. only.</b>  1. Need Notice of Hearing.  2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardian for: <ul style="list-style-type: none"> <li>• Dewayne McCoy (Father)</li> <li>• Angelita Crawford (Guardian)</li> </ul> <b>Note:</b> Angelita Crawford was not served with a Notice of Hearing which includes date, time and location of hearing date. <ul style="list-style-type: none"> <li>• Paternal Grandparents (Not Listed)</li> <li>• James English (Maternal Grandfather)</li> </ul>	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
	Order	x		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<b>Reviewed by:</b> LV	
			<b>Reviewed on:</b> 03/07/2016	
			<b>Updates:</b>	
			<b>Recommendation:</b>	
			<b>File 5A- Golden/ Kerns/ McCoy</b>	

**5A**

**5B    Ariel Golden, Dallas Kerns, Dylan Kerns & Dwayne McCoy (GUARD/P)**  
**Case No. 09CEPR00065**

**Petitioner      English, Anita Rachell (Pro Per – Mother)**  
**Petition for Termination of Guardianship**

		<b>ANITA RACHELL ENGLISH, mother, is petitioner.</b>  <u>Please see petition for details</u>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note: This petition pertains to DeWayne McCoy, Jr. only.</b>  1. Need Notice of Hearing.  2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardian for: <ul style="list-style-type: none"> <li>• Dewayne McCoy (Father)</li> <li>• Angelita Crawford (Guardian)</li> <li>• Paternal Grandparents (Not Listed)</li> <li>• James English (Maternal Grandfather)</li> </ul>	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input type="checkbox"/>	<b>Notice of Hrg</b>			<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Aff.Mail</b>			<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input checked="" type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
			<b>Reviewed by:</b> LV	
			<b>Reviewed on:</b> 03/07/2016	
			<b>Updates:</b>	
			<b>Recommendation:</b>	
			<b>File 5B- Golden/ Kerns/ McCoy</b>	

**5B**

**6A James Samuel Fujisaka (Estate) Case No. 10CEPR00833**

Attorney MAROIS, KIM (of Santa Rosa, Ca., for Joachim Voss – Executor)

**Probate Status Hearing Re: Filing Oregon Status**

<b>DOD: 04/13/2010</b>	<b>JOACHIM VOSS</b> , was appointed Executor with full IAEA authority and bond of \$300,000.00.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 120915</b>	Minute Order of 10/14/2015 set this Status Hearing for the Filing of Oregon Status.	<b>6B is the Petition for Fifth and Final Account.</b>
<b>Aff.Sub.Wit.</b>	Minute Order states: Status Report is to be filed by 12/07/2015 with attached exhibit of the filed Oregon petition.	<b>Minute Order of 12/09/2015: Ms. Marois will file a petition for Final Distribution upon the Oregon Court adopting the terms of the trust; any objections must be filed in the Oregon court on or before 12/22/2015.</b>
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Status Report Regarding Adoption of Testamentary Trust Provisions Approved by California Superior Court in Oregon filed 12/04/2015</b> states at the Status Conference on 10/14/2015, this Court scheduled a further Status Conference for 12/09/2015, and ordered that by 12/07/2015, a status report be filed with this Court with, at minimum, a stamped endorsed filed copy of the Oregon Petition for Instructions to adopt and approve the terms of the testamentary trusts approved by the California Superior Court. Executor's counsel hereby provides the following status report to the Court. This Court, by its Order filed July 18, 2012 (the "Distribution Order"), established the terms of the testamentary trusts for Decedent's daughters, Claire Atsuko Baltasar, sometimes also known as Claire Asuko Jeciel Baltasar ("Claire"), born 09/24/1993 and a resident of the Philippines; Nicole Vargas Mairongo ("Nicole") born 10/26/1999 and a resident of Spain; and Dana Zsofia Fujisaka Calderon Montoya, sometimes known as Dana Zsofia Fujisaka Calderon ("Dana") born 09/26/2003 and a resident of Colombia.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		<b>Reviewed by: LV</b>
<b>Status Rpt</b>		<b>Reviewed on: 03/07/2016</b>
<b>UCCJEA</b>		<b>Updates:</b>
<b>Citation</b>		<b>Recommendation:</b>
<b>FTB Notice</b>	<b>Please see additional page</b>	<b>File 6A– Fujisaka</b>

**6A**



The Distribution Order also appointed Exchange Bank of Santa Rosa, California, as the trustee of each of the testamentary trusts. It further ordered distribution of the bulk of Decedent's California estate, in trust, to Exchange Bank as the trustee of the three testamentary trusts, one for each of the Decedent's daughters. The testamentary trusts terminate by their terms in favor of the beneficiary when the beneficiary attains age 21. Claire attained the age of 21 in 2014, and her testamentary trust has since terminated and been distributed to her. The two remaining testamentary trusts for Nicole and Dana continue to be managed by Exchange Bank.

The Executor has held the California Probate open pending the sale of the properties subject to the Oregon probate on the theory that it would be most expedient to sell the Oregon properties and upon their sale, close the Oregon estate and distribute the proceeds into the California probate estate for distribution to the residuary beneficiaries as established in the Distribution order. The Executor believes that the interests of Decedent's daughters are best served if the Oregon properties are sold through the Probate in Oregon because of the inherent difficulties of coordinating a sale with the trustee in the United States and or more non-English speaking beneficiaries in one or more foreign countries. The Executor of the California and Oregon probates also believes that the interests of Decedent's daughters are best served if the proceeds of the Oregon probate are distributed to any over-age 21 beneficiary outright and in trust to Exchange Bank as the Trustee of the existing trusts established for any beneficiary under-age 21 at the time of distribution in accordance with the carefully constructed provisions of the testamentary trusts approved by this Court.

This Court has instructed the Executor to close the California probate. The Executor and the guardians ad litem ("GALs") appointed for the minor beneficiaries have agreed that the best way to close the California estate is to seek to have the Oregon Court adopt the terms of the Distribution Order as the terms of the testamentary trusts with Exchange Bank continuing to serve as the trustee of said trusts. Accordingly, this Court ordered the California Executor to seek the Oregon Court's adoption of the testamentary trust provisions as established by the Distribution Order.

The Executor's probate counsel in Oregon, Samuel E. Tucker, filed a Petition for Instructions as requested by this Court with the Oregon Probate Court on November 25, 2015. A true and correct copy of the endorsed filed Petition for Instructions is attached hereto as Exhibit A. Said Petition for Instructions along with a Notice for Filing Objections to Petition for Instructions was served by mail on 12/01/2015. A true and correct copy of the Affidavit of Mailing Notice for Filing Objections to Petition for Instructions is attached hereto as Exhibit B. Pursuant to the Notice for Filing Objections to Petition for Instructions, any objections must be filed with the Oregon Probate Court on or before 12/22/2015.

It is the understanding that if no objections are filed with the Oregon Court to the Petition for Instructions on or before 12/22/2015, Oregon counsel intends to present a Limited Judgment Approving the Petition for Instructions to the Oregon Probate Court for its consideration and approval. In anticipation that the Oregon court will adopt the terms of the testamentary trusts as approved by the California Superior Court, Petitioner will file a Final Account and Petition for Final Distribution for this estate prior to 12/31/2015.

**6B James Samuel Fujisaka (Estate) Case No. 10CEPR00833**

Attorney MAROIS, KIM (of Santa Rosa or Joachim Voss – Executor)

Attorney Helon, Marvin T (Court Appointed Guardian Ad Litem for Beneficiary – Dana Zsofia Fujisaka)

Attorney Rindlisbacher, Curtis (Court Appointed Guardian Ad Litem for Beneficiary – Nicole Vargas)

Fifth and Final Account and Status Report of Executor and Petition for: (1) Approval and Settlement of Fifth and Final Account and Report; (2) Allowance of Fees and Costs of Guardians Ad Litem; (3) Discharge of Guardians Ad Litem; (4) Allowance of Statutory Executor's Compensation; (5) Allowance of Statutory Attorneys' Fees and Reimbursement of Costs; (6) Allowance of Extraordinary Attorneys' Fees to Clement, Fitzpatrick, & Kenworthy; (7) Authorization to Reserve \$12,000 For Closing Expenses and Transfer Said Funds to the Oregon Probate; and (8) Final Distribution

<b>DOD: 04/13/2010</b>		<b>JOACHIM VOSS</b> , Executor with Full IAEA and bond of \$300,000.00, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Account period: 11/01/2014 through 12/312015</b>	1. Order does not comply with Local Rule 7.6.1, all orders must be complete in themselves, monetary sums must be stated in dollars and not as a percentage of the estate. Need new order.  <b>Note:</b> Pursuant to Local Rule 7.12.6 the court will set the following Status Report for the Informal Accounting of the Closing Reserve:  <b>Thursday, September 7, 2016 at 9:00 a.m. in Dept. 303</b> for an Informal Accounting of the \$12,000.00 Closing Reserve.  Pursuant to Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and not appearance will be required. <b>Filing of the Informal Accounting of closing reserve will not generate a new hearing date.</b>
		Accounting: \$ <b>82,550.89</b>	
		Beginning POH: \$ <b>82,516.06</b>	
		Ending POH: \$ <b>78,314.46</b>	
<b>Cont. from</b>		<b>Executor: \$2,557.72</b> (partial payment of Statutory compensation for ordinary services)	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	<b>Attorney: \$2,557.72</b> (partial payment of Statutory compensation for ordinary services)	
<input checked="" type="checkbox"/>	<b>Verified</b>	<b>Attorney X/O: \$19,000.00</b> (compensation for extraordinary legal services involving income tax matters, foreign beneficiaries, MetLife/GAL issues, testamentary trust issues which totaled \$45,250 however attorney voluntarily reduced their fees to \$19,000)	
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b> 11/24/10	<b>Marvin Helon (GAL for Dana Zsofia Fujisaka):</b> <b>\$1,000.00</b> (Declaration includes fees in the amount of \$1,426 however Mr. Rindlisbacher has agreed to cap his fees at \$1,000)	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>	<b>Curtis Rindlisbacher (GAL for Nicole Vargas):</b> <b>\$1,053.81</b> (Declaration includes fees in the amount of \$2,879.29 however Mr. Helon has agreed to cap his fees at \$1053.81)	
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>	Costs: <b>\$1,550.70</b> (filing fees, certified copies)	
<input type="checkbox"/>	<b>Status Rpt</b>	Closing: <b>\$12,000.00</b> (taxes)	
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
<u>Please see additional page</u>			<b>Reviewed by:</b> LV <b>Reviewed on:</b> 03/07/2016 <b>Updates:</b> <b>Recommendation:</b> <b>File 6B- Fujisaka</b>

**6B**

Dept. 303, 9:00 a.m. Wednesday, March 9, 2016

**Distribution, pursuant to decedent's will, is to:**

35% to Claire Atsuko Baltasar

20% to Exchange Bank, Trustee of the James Samuel Fujisaka Trust for the benefit of Nicole Vargas Mairongo;

45% Exchange Bank, Trustee of the James Samuel Fujisaka Trust for the benefit of Dana Zsofia Fujisaka Calderon Montoya

Attorney Heather H. Kruthers (for Public Guardian, Conservator)

## Probate Status Hearing: Termination of Proceedings for Deceased Conservatee

<b>DOD: 9/3/2015</b>	<b>PUBLIC GUARDIAN</b> was appointed conservator of the Person and Estate on 11/2/2010.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Conservatee died 9/3/2015.	
<b>Cont. from</b>	<b>Notice of Status Hearing filed 10/9/2015</b> set this hearing for the termination of proceedings for the deceased Conservatee. <i>Clerk's Certificate of Mailing</i> shows notice was mailed to the Public Guardian and County Counsel on 10/9/2015.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
✓ <b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Status Report Re: Filing of the Third and Final Account filed 2/19/2016</b> states:	
<b>Aff.Mail</b>	<ul style="list-style-type: none"> <li>The Public Guardian is short-staffed; one of the support staff suddenly retired for medical reasons, and that person has not been replaced;</li> </ul>	
<b>Aff.Pub.</b>	<ul style="list-style-type: none"> <li>Although the Public Guardian intends on replacing this person, the County's recruitment period is usually at least 3 months from the time the vacancy occurs to the time it is filled;</li> </ul>	
<b>Sp.Ntc.</b>	<ul style="list-style-type: none"> <li>The person who prepares the necessary documents for accounts is currently covering both her duties and the duties of the other staff member who retired; therefore, she is unable to get all the accounts done that need to be done before the scheduled status hearings;</li> </ul>	
<b>Pers.Serv.</b>	<ul style="list-style-type: none"> <li>Furthermore, there have been a large number of accounts set for status hearings, which makes it even harder for her to get to all of them;</li> </ul>	
<b>Conf. Screen</b>	<ul style="list-style-type: none"> <li>In addition, where applicable, her services are needed to correct errors and discrepancies found by the Probate Examiners in the accounts that are being heard;</li> </ul>	
<b>Letters</b>	<ul style="list-style-type: none"> <li>Therefore, it is respectfully requested that the next status hearing for this matter be set no sooner than <b>90 days</b> from the date of this status hearing.</li> </ul>	
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
✓ <b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 3/3/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 7- Miller</b>

Attorney Jeffrey B. Pape (for Petitioner Hellen K. Davis, Trust Beneficiary)  
 Attorney Matthew C. Wagner (for Respondent Patricia Vaughn, Successor Trustee)

**Probate Status Hearing Re: Settlement Agreement**

<b>DOD: 1/23/2011</b>	<b>HELLEN K. DAVIS</b> , Beneficiary, filed a <i>Petition to Instruct Trustee to Terminate Trust, Distribute Assets, Perform Terms of Settlement Agreement, Objection to Accounts, and Request for Surcharge and Other Remedies</i> on 10/21/2015.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Pursuant to CA Rule of Court 7.1052(c), need current status report pursuant to Local Rule 7.5(B), which provides that in all matters set for Status Hearing, except if the required document is filed, a verified Status Report must be filed no later than 10 days before the hearing; notice of the status hearing with a copy of the Status Report shall be served on all necessary parties.
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	X	
<b>Aff.Mail</b>	X	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>	X	
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

**HELLEN K. DAVIS**, Beneficiary, filed a *Petition to Instruct Trustee to Terminate Trust, Distribute Assets, Perform Terms of Settlement Agreement, Objection to Accounts, and Request for Surcharge and Other Remedies* on 10/21/2015.

Response of **PATRICIA A. VAUGHN** [Successor Trustee] to *Petition to Instruct Trustee, Distribute Assets, Perform Terms of Settlement Agreement, Objections to Accounts, and Request for Surcharge and other Remedies* was filed 11/25/2015.

**Minute order dated 12/2/2015** set the matter for trial with a one day estimate, and set a settlement conference on 2/16/2016.

**Minute Order dated 2/16/2016** from the settlement conference states counsel met in chambers and have come to an agreement. Matter set on 3/9/2016 for the status regarding the settlement agreement.

<b>Reviewed by:</b> LEG
<b>Reviewed on:</b> 3/3/16
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 8- Wheeler</b>

Attorney Heather H. Kruthers (for Public Guardian, Trustee)

## Probate Status Hearing Re: Filing of the Final Account

<b>Deceased</b>		<b>PUBLIC GUARDIAN</b> was appointed Trustee on 5/22/2012.	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
<b>Cont. from</b>		<b>Minute Order dated 12/2/2015</b> from the Third Account states counsel informed the Court that the Beneficiary is now deceased. Court set status hearing on 3/9/2016 for the status of filing the final account.	1. Pursuant to Local Rule 7.5(B) providing that in all matters set for Status Hearing a verified Status Report must be filed, and notice of the status hearing with a copy of the Status Report shall be served on all necessary parties, need proof of service of notice to <b>CLARA SOTO</b> .	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>	<b>Status Report Re: Filing of the Third and Final Account filed 2/19/2016</b> states: <ul style="list-style-type: none"> <li>The Public Guardian is short-staffed; one of the support staff suddenly retired for medical reasons, and that person has not been replaced;</li> <li>Although the Public Guardian intends on replacing this person, the County's recruitment period is usually at least 3 months from the time the vacancy occurs to the time it is filled;</li> <li>The person who prepares the necessary documents for accounts is currently covering both her duties and the duties of the other staff member who retired; therefore, she is unable to get all the accounts done that need to be done before the scheduled status hearings;</li> <li>Furthermore, there have been a large number of accounts set for status hearings, which makes it even harder for her to get to all of them;</li> <li>In addition, where applicable, her services are needed to correct errors and discrepancies found by the Probate Examiners in the accounts that are being heard;</li> <li>Therefore, it is respectfully requested that the next status hearing for this matter be set no sooner than <b>90 days</b> from the date of this status hearing.</li> </ul>		
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input type="checkbox"/>	<b>Notice of Hrg</b>			X
<input type="checkbox"/>	<b>Aff.Mail</b>			X
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input checked="" type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
			<b>Reviewed by:</b> LEG	
			<b>Reviewed on:</b> 3/3/16	
			<b>Updates:</b>	
			<b>Recommendation:</b>	
			<b>File 9- Soto</b>	

Attorney

Amador, Catherine A. (for Bryan Snavelly – Co-Conservator of the Person)

Attorney

Teixeira, J. Stanley (for Brad Snavelly – Co-Conservator of the Person)

Attorney

Bagdasarian, Gary G. (Court appointed for Conservatee, also representing Bruce Bickel as Conservator of the Estate per Substitution filed 8/27/15)

Attorney

Kruthers, Heather (for Public Guardian)

## Probate Status Hearing Re: Filing Inventory and Appraisal

	<b>PUBLIC GUARDIAN</b> is current Conservator of the Estate.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Need Final Inventory and Appraisal or written status report per Local Rule 7.5.</b>
<b>Cont. from 102815, 120215, 011316</b>		
<b>Aff.Sub.Wit.</b>	Bond was filed 8/5/15 and Letters issued 9/3/15.	
<b>Verified</b>		
<b>Inventory</b>	At the hearing on 6/18/15, the Court set status hearing for the filing of the Inventory and Appraisal for 10/28/15.	
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Status Report filed 10/26/15 by Attorney Bagdasarian, for Conservator of the Estate Bruce Bickel, states</b> the I&A has been submitted to Probate Referee Steven Diebert and they are awaiting the completion of same for filing. A continuance of 30 days is requested.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>	<b>I&amp;A Partial No. 1 was filed 11/18/15 by Bruce Bickel.</b>	
<b>Duties/Supp</b>		
<b>Objections</b>	<b>I&amp;A Partial No. 2 was filed 1/11/16 by Bruce Bickel.</b>	
<b>Video Receipt</b>		
<b>CI Report</b>	On 12/2/15, the Court accepted the resignation of Bruce Bickel as Conservator of the Estate and trustee and appointed the Public Guardian as Conservator of the Estate.	
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 3/3/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 10A – Snavelly</b>

**Probate Status Hearing Re: Filing of the Final Account of Mr. Bickel**

	<p><b>BRUCE BICKEL</b> was appointed as Conservator of the Estate on 6/18/15 with bond of \$130,000.00.</p> <p>Bond was filed 8/5/15 and Letters issued 9/3/15.</p> <p>On 12/2/15, the Court accepted Mr. Bickel's resignation and set this status hearing for the filing of his final account.</p> <p><b>Status Report filed 1/12/16 states</b> as of 1/12/16, Mr. Bickel has transferred all funds on deposit in conservatorship bank accounts to the Public Guardian's office and all pertinent records and accounts have been delivered to the successor conservator of the estate.</p> <p>Mr. Bickel no longer holds any estate property in his possession or under his control.</p> <p>Mr. Bickel requests an additional 60 days to file his accounting from appointment through 1/12/16.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 1/13/16:</b> The Court directs Mr. Bickel to speak with an examiner regarding the issue of obtaining a trust case number. Ms. Amador states she is willing to file a petition to open the trust case if needed.</p> <p><b>Note:</b> The minute order of 12/2/15 states it is the Court's intention to also appoint the Public Guardian as trustee upon filing of documents that open the trust matter; however, it does not appear that any petition regarding the trust has yet been filed.</p>
<b>Cont. from 011316</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 3/3/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 10B- Snavelly</b>



Probate Status Hearing Re: the Filing of the First Account

		<p><b>PUBLIC GUARDIAN</b> was appointed as conservator of the person and estate on 10/8/14.</p> <p>Letters issued on 10/14/14.</p> <p>Inventory and appraisal, partial no. 1, filed on 2/18/15 with a value of \$128,858.64.</p> <p>Inventory and appraisal, final, filed on 3/4/15 showing a value of \$3,500.00.</p> <p>Minute order dated 10/8/14 set this status hearing for the filing of the first account.</p> <p><b>Status report filed on 2/22/16</b> states the Public Guardian's office is currently short staffed, because one of the support staff suddenly retired for medical reasons. The person who prepares the necessary documents for the accounts is currently covering both her duties and the duties of the other staff member who retired.</p> <p>Furthermore, there have been a large number of accounts set for status hearings, which makes it even harder for her to get to all of them.</p> <p>Therefore, it is respectfully requested that the next status hearing for this matter be set no sooner than 90 days from the date of this status hearing.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>2. Need first account</p>
<b>Cont. from 120915</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 3/3/15</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 11 - Posey</b></p>	

Attorney Linda K. Durost (for Petitioner Pamela Webb, Administrator)

## First and Final Report of Administrator on Waiver of Account; for Allowance of Statutory Attorneys' Fees and Costs; and Petition for Final Distribution

<b>DOD: 3/24/2013</b>	<b>PAMELA WEBB</b> , daughter and Administrator, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>  2. <i>Petition</i> does not but should indicate the source of payment of the statutory attorney fees. Proposed order finds at paragraph 1, page 3, that Petitioner is ordered to pay the attorney fees; however, the estate consists solely of non-cash assets.  <b>Note:</b> Proposed order has been interlineated to include a finding that Administrator will be discharged upon filing of a receipt and submission of an <i>Ex Parte Petition for Final Discharge and Order</i> .
	Accounting is waived.		
<b>Cont. from</b>	I & A	— \$182,300.00	
<b>Aff.Sub.Wit.</b>	POH	— \$182,300.00 (no cash)	
✓ <b>Verified</b>			
✓ <b>Inventory</b>	Administrator	— <b>waives</b>	
✓ <b>PTC</b>	Attorney	— \$6,469.00	
✓ <b>Not.Cred.</b>	(statutory)		
<b>Notice of Hrg</b>	<b>Distribution pursuant to Decedent's Will is to:</b>		
<b>Aff.Mail</b>	<b>PAMELA WEBB</b> – entire estate consisting of real property, vehicle, and furnishings, furniture, and personal belongings.		
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>	101614		
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
✓ <b>9202</b>			
✓ <b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
✓ <b>FTB Notice</b>			
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 3/4/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 12- Lawler</b>

Attorney

Childs, Erin M (for Carl Clark – father/Objector)

Attorney

Hunt, Gary A. (for Penny Sabanovich – maternal grandmother/Petitioner)

Father

Clark, Carl (Pro Per – Father) (formerly represented by Attorney Erin M. Childs.)

**Petitioner Penny Sabanovich's Notice of Motion and Motion to Enforce July 24, 2015 Order and Clarification of Visitation Stipulation and Order**

			<p><b>PENNY SABANOVICH</b>, Maternal Grandmother, and former temporary guardian, is Movant.</p> <p><b>Movant states</b> on 7/24/15, the judge denied Movant's petition for guardianship, terminated her temporary guardianship, and ordered that Ali be returned to Mr. Clark. Among other provisions, the Court ordered that Ali "begin seeing, or continue to see a family therapist on a regular basis to discuss fears and for the therapist to include Mr. Clark when the therapist feels it is appropriate. Additionally, Mr. Clark is to take any parenting classes if the therapist deems it necessary, and Mr. Clark is to encourage participation in activities that the minor is interested in." As to Ali's mother, Karen Clark, the Court ordered no visitation until she presents herself to the Court.</p> <p>As part of its 7/24/15 order, the Court ordered Ms. Sabanovich one-half of every Christmas and Spring break, and at least 30 days of every summer break.</p> <p>Subsequently, the parties entered into a stipulation beyond what was awarded in the 7/24/15 order. The stipulation was drafted and circulated on 9/23/15, but due to inadvertent procedural delays, was not filed until 1/7/16.</p> <p>Movant states this Court has authority and jurisdiction to enforce the Court's 7/24/15 order and clarify the parties stipulation pursuant to Probate Code §2630.</p> <p>Movant states she does not believe the order regarding no visits to the mother is being followed and that Ali's care and safety continue to be compromised. Ali confided that she only saw a therapist twice before Mr. Clark told her she no longer needed it and he could not afford it.</p> <p align="center"><b><u>SEE PAGE 2</u></b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p align="center"><b><u>SEE PAGE 2</u></b></p>
	<b>Aff.Sub.Wit.</b>			
	<b>Verified</b>	x		
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>	w		
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
	<b>Order</b>	x		
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 3/4/16
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 13- Clark</b>

## Page 2

**Movant states** this is a clear violation of the Court's order of 7/24/15. Additionally, Ali's safety continues to be jeopardized as Karen Clark continues to play a role in Ali's life, despite this Court's order that she have no visitation. See motion for details regarding an incident which suggests contact. Accordingly, Ms. Sabanovich respectfully requests that this Court compel Mr. Clark to resume therapy sessions for Ali on a consistent and ongoing basis, and that Mr. Clark not interfere with the Court's order prohibiting Karen Clark from contact with Ali.

Ms. Sabanovich further requests the Court clarify as to the "transportation" provision of the parties stipulation filed 1/7/16, which provides that for the first nine months, Ms. Sabanovich will provide all transportation, and thereafter, the parties will meet for all exchanges at the Baskin Robbins in Los Banos. As noted above, the stipulation was entered into in September 2015, and it was understood that the nine months would end in May 2016, with exchanges in Los Banos to begin in June 2016. Ms. Sabanovich requests clarification that the exchanges will begin in June.

See Declaration of Gary A. Hunt in support of motion.

**For the foregoing reasons, Ms. Sabanovich respectfully requests this Court order compliance by Mr. Clark with its 7/24/15 order and clarification of the parties' stipulation.**

**NEEDS/PROBLEMS/COMMENTS:**

1. This motion is not verified by Ms. Sabanovich pursuant to Probate Code §1020.
2. Probate Code §1602 states while a parent has custody, proceedings for modification of visitation orders made upon termination of a guardianship shall be determined in a proceeding under the Family Code. If no custody case exists in any county, the visitation order may be used as the basis for opening a case in the county in which the custodial parent resides.

Carl Clark, the custodial parent, and the minor reside in Salinas, which is Monterey County.

Need clarification re whether any family law case is currently existing in any other jurisdiction, and further authority re jurisdiction to make further orders re enforcement or clarification of this order in the Fresno Superior Court Probate Court. Ms. Sabanovich may be required to either seek joinder to an existing Family Law case, or open a new case in Monterey County, as applicable.

**Note:** Petitioner cites Probate Code §2630; however, this section pertains to jurisdiction re settling accounts on termination guardianship of the estate only and does not apply in this situation.

3. Notice of hearing was served only on Carl Clark (father). Need notice to the minor Alisha directly per Cal. Rule of Court 7.51(d) and on Karen Clark (mother) since this motion concerns and affects her.
4. Need order pursuant to Local Rule 7.1.1.F.

Attorney Thomas L. McCormick, of Menlo Park (for Beverly H. Leach, Executor)

## Order to Show Cause Re: Failure to File the Inventory and Appraisal

<b>DOD: 08/14/14</b>	<p><b>BEVERLY H. LEACH</b>, spouse, was appointed Executor with full IAEA and without bond on 09/01/15.</p> <p><b>Minute Order from 09/01/15</b> set this status hearing regarding filing of the Inventory &amp; Appraisal.</p> <p><b>Minute Order dated 2/3/2016 states:</b></p> <ul style="list-style-type: none"> <li>• NO APPEARANCES;</li> <li>• The Court issues an Order to Show Cause to Thomas L. McCormick as to why he should not be sanctioned for his failure to appear today, and to Beverly Leach as to why she should not be removed as Executor for her failure to file the Inventory and Appraisal;</li> <li>• Both Thomas L. McCormick and Beverly Leach are ordered to be personally present in court or appear via CourtCall on 3/9/2016.</li> </ul> <p><b>Clerk's Certificate of Mailing</b> shows a copy of the <i>Minute Order</i> dated 2/3/2016 was mailed to Attorney McCormick and Beverly Leach on 2/3/2016.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> <i>Final Inventory and Appraisal</i> filed 2/19/2016 shows an estate value of <b>\$254,821.04</b>.</p> <p><b>Note Re Future Hearing:</b> Probate Status Hearing is set for filing of the first account and/or petition for final distribution on <b>11/2/2016</b>.</p>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
<p><b>Reviewed by:</b> JF / LEG</p> <p><b>Reviewed on:</b> 3/4/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 14- Leach</b></p>		

## Petition for Appointment of Guardian of the Person

		Temporary granted to Julia Pena, page 15B.  <b>MARIA G. LEMUS CISNEROS</b> , paternal aunt, is petitioner.  Please see petition for details.  <b>Court Investigator Report filed on 10/8/15</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need proof of service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice of Declaration of Due Diligence on: a. Antonio Hernandez Corona (maternal grandfather) - unless the court dispenses with notice.
Cont. from 102115, 121615, 021716			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

Reviewed by: KT
Reviewed on: 3/4/16
Updates:
Recommendation:
File 15A – Lemus

## Petition for Appointment of Guardian of the Person

		<b>Temporary Expires 3/9/16</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>JULIA PENA</b> , Maternal aunt, is petitioner.	
		Please see petition for details.	2. Need proof of personal service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice of Declaration of Due Diligence on: a. Pablo Lemus Cisneros (father)
<b>Cont. from 121615, 021716</b>		<b>Court Investigator Report filed on 12/7/153</b>	
	<b>Aff.Sub.Wit.</b>	<b>Declaration of Maria Lemus, Competing Petitioner Regarding Concerns of Health and Safety of the Minor filed on 2/11/16.</b>	3. Need proof of service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice of Declaration of Due Diligence on: b. Antonio Hernandez Corona (maternal grandfather) - unless the court dispenses with notice.
✓	<b>Verified</b>	<b>Declaration of Julia Pena filed on 3/2/16</b>	
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
	<b>Aff.Mail</b>	X	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>	X	
✓	<b>Conf. Screen</b>		
✓	<b>Letters</b>		
✓	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
✓	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
✓	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 3/4/16</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 15B – Lemus</b>

15B

## Probate Status Hearing RE: Terms of the Reverse Mortgage

<b>DOD: 6/6/15</b>	<b>GENARO A. SALAS</b> was appointed Administrator with Limited IAEA Authority and without bond on 1/27/16.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>	Letters issued on 1/27/16.	
<b>Aff.Sub.Wit.</b>	<b>Minute order dated 1/27/16 states</b>	
<b>Verified</b>	Genero Salas represents that there is a reverse mortgage on the home, and two adult children are residing in the home. The Court admonishes Mr. Salas that he is not to sell any property and not to may any payments or distributions without a Court order.	
<b>Inventory</b>	Furthermore, the Court orders Mr. Salas not to sign any real estate/mortgage documents without Court approval. Mr. Salas is to bring paperwork showing the terms of the reverse mortgage to the hearing on 3/9/16.	
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 3/4/16</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 16- Salas</b>



Amended Petition to Determine Succession to Real Property

DOD: 8/21/15		<b>LINDA ARREDONDO and DAVID ARREDONDO</b> , Friends, are Petitioners.  40 days since DOD  No other proceedings  <b>I&amp;A: \$55,000.00</b> (real property located at 3452 E. Mono Avenue in Fresno)  <b>Will dated 3/26/08 (Witnessed 3/26/09)</b> devises the real property to Petitioners.  <b>Petitioners request</b> Court determination that the decedent's 100% interest in the real property passes to them as husband and wife.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Minute Order 2/10/16</u> : Timothy Wells, the decedent's step-son, needs to be properly noticed or due diligence be affected. Counsel is to orally report as to the correct date for the will at the hearing on 3/9/16.  <u>Update</u> : Notice of Hearing filed 2/19/16 indicates service on all interested parties, including Timothy Wells, on 2/16/16.  The following remains noted for reference:  <u>Note</u> : Pursuant to Probate Code §6110(c)(1), it does not appear to be an issue that the will is dated 3/26/08 and the witness signatures are dated 3/26/09. The will appears to have been originally prepared by Mr. Boyajian and the original was deposited on 11/12/15 to 15CEPR01100. However, because both of the dates are typed rather than handwritten, the Court may require clarification regarding the date of the will.  <u>Update</u> : Attorney's declaration filed 3/7/16 states it is their belief that the proper date for the will was <u>3/26/09</u> due to notes and other information found in the decedent's file.  <u>Note</u> : On 12/31/15, the CA Dept. of Health Care Services filed a Creditor's Claim and Request for Special Notice. Another creditor's claim was filed 2/5/16 by AscensionPoint Recovery Services. <u>However, there is no provision for creditor claims in summary proceedings</u> , and because Letters will not issue, notice is not required to be served per Probate Code §1250.	
Cont. from 010616, 021016				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/o
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: skc				
Reviewed on: 3/3/16				
Updates: 3/7/16				
Recommendation:				
File 17- Wells				

**Petition for Letters of Administration; Authorization to Administer under IAEA**

<b>DOD: 9/7/15</b>		<p><b>MANUEL AVILA MENDOZA</b>, Son, is Petitioner and requests appointment as Administrator with Full IAEA with bond of \$160,000.00.</p> <p>Full IAEA – ok</p> <p>Decedent died intestate</p> <p>Residence: Fresno Publication: Business Journal</p> <p>Estimated value of estate: Personal property: \$10,000.00 Real property: \$150,000.00</p> <p>Probate Referee: Steven Diebert</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note: The Court will set status hearings as follows:</b></p> <ul style="list-style-type: none"> <li>• <b>Wednesday April 20, 2016</b> for filing of bond</li> <li>• <b>Wednesday August 10, 2016</b> for filing Inventory and Appraisal</li> <li>• <b>Wednesday May 10, 2017</b> for filing the first account or petition for final distribution</li> </ul> <p>If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar.</p>
<b>Cont. from 121615, 021016</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> w/o		
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 3/3/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> SUBMITTED</p> <p><b>File 18 - Salazar</b></p>	

Petitioner Guadalupe Salas (Pro Per)

## Petition for Appointment of Guardian of the Person

		<b><u>NO TEMPORARY REQUESTED</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>GUADALUPE SALAS</b> , maternal grandmother, is Petitioner.	<b>Petitioner is Spanish speaking only.</b>
		<b>~Please see Petition for details~</b>	
<b>Cont. from 020316</b>		<b>Court Investigator filed a report on 01/27/2016.</b>	1. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		a. Alvino Luna, father, if Court does not find due diligence per Declaration filed 2/16/2016;
<input checked="" type="checkbox"/>	<b>Verified</b>		b. Paternal grandparents (all), if Court does not find due diligence per Declaration filed 2/16/2016.
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>		
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>Clearances</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		<b>Reviewed by:</b> JF / LEG
<input type="checkbox"/>	<b>Status Rpt</b>		<b>Reviewed on:</b> 3/4/16
<input checked="" type="checkbox"/>	<b>UCCJEA</b>		<b>Updates:</b>
<input type="checkbox"/>	<b>Citation</b>		<b>Recommendation:</b>
<input type="checkbox"/>	<b>FTB Notice</b>		<b>File 19- Luna &amp; Petris</b>

**First Account Current and Report of Trustee and Petition for Settlement of  
First Account and for Distribution of Trust**

<b>DOD: 09/07/13</b>		<b>CHARLES CASPARIAN</b> , trustee, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 1/27/16. Minute order</b> states Teresa Harris states that she has questions and has not had communication with Robyn Esraelian. Mr. Rube requests a 30 day continuance as he was unsuccessful in answering Ms. Harris's questions satisfactorily this morning. The Court orders that any objections must be filed and properly served by 2/24/16. Ms. Esraelian is ordered to be personally present or appear via CourtCall on 3/9/16 to address any questions that might be raised in written objections.  1. Order does not comply with Local Rule 7.6. All orders distributing property and order settling accounts shall contain a statement as to the balance of the estate on hand, specifically noting the amount of cash included in the balance. Probate orders shall be drawn so that their general effect may be determined without reference to the petition on which they are based.
		Account period: <b>09/07/13 – 10/31/15</b>	
		Accounting: <b>\$970,045.44</b>	
		Beginning POH: <b>\$889,972.25</b>	
		Ending POH: <b>\$878,425.51</b>	
<b>Cont. from 012716</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

Petitioner: Maria Antonia Quiroz (pro per)

Attorney: Jennifer Walters (Court appointed for proposed conservatee)

## Petition for Appointment of Probate Conservator

		<p><b>THERE IS NO TEMPORARY.</b> No temporary was requested.</p> <p><b>MARIA QUIROZ</b>, partner, is petitioner.</p> <p>Please see petition for details.</p> <p><b>Court Investigator Report filed on 2/10/16</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>	
<b>Cont. from 021716</b>				
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>			W/
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
✓	<b>Pers.Serv.</b>			
✓	<b>Conf. Screen</b>			
✓	<b>Letters</b>			
✓	<b>Duties/Supp</b>			
	<b>Objections</b>			
✓	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
✓	<b>Citation</b>			
	<b>FTB Notice</b>			
			Reviewed by: KT	
			Reviewed on: 3/4/16	
			Updates:	
			Recommendation:	
			File 21- Brown	

Petitioner: Mary J. Castaneda (pro per)

Objector: Elizabeth Alcazar (pro per)

## Petition for Appointment of Probate Conservator of the Person

		<p><b>THERE IS NO TEMPORARY.</b> Temporary was denied.</p> <p><b>MARY J. CASTANEDA</b>, maternal aunt, is petitioner.</p> <p>Please see petition for details.</p> <p><b>Objections of Elizabeth Alcazar filed on 2/3/16.</b></p> <p><b>Court Investigator Report filed on 1/28/16</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Conservatorship Video viewing receipt.</p>	
Cont. from 020816				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
✓	Objections			
	Video Receipt		X	
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			<p>Reviewed by: KT</p> <p>Reviewed on: 3/3/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 22A- Alcazar</p>	

22A

Petitioner: Elizabeth Alcazar (pro per)

Competing Petitioner: Mary J. Castaneda (pro per)

## Petition for Appointment of Probate Conservator

			<p><b>THERE IS NO TEMPORARY.</b> Temporary was denied.</p> <p><b>ELIZABETH ALCAZAR</b>, sister, is petitioner</p> <p>Please see petition for details.</p> <p><b>Court Investigator Report filed on 1/28/16</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W/		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 3/3/16	
			Updates:	
			Recommendation:	
			File 22B- Alcazar	

22B

Petitioner Manuela Chavez (Pro Per)

## Petition for Appointment of Guardian of the Person

<p align="center"><b>NO TEMPORARY REQUESTED</b></p> <p><b>MANUELA CHAVEZ</b>, maternal grandmother, is Petitioner.</p> <p align="center"><i>~Please see Petition for details~</i></p> <p>Court Investigator's Report was filed on 2/25/2016.</p>			<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>If Court does not excuse notice as Petitioner requests nor find due diligence per Declarations filed 2/23/2016, the following defects are noted:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of personal service of the Notice of Hearing with a copy of the Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, for: <ul style="list-style-type: none"> <li>• Guillermo Clemente, father.</li> </ul> </li> <li>3. Need proof of service by mail of the Notice of Hearing with a copy of the Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, for: <ul style="list-style-type: none"> <li>• paternal grandparents.</li> </ul> </li> </ol>																																																																											
<table border="1"> <tr><td colspan="3">Cont. from</td></tr> <tr><td></td><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>✓</td><td>Verified</td><td></td></tr> <tr><td></td><td>Inventory</td><td></td></tr> <tr><td></td><td>PTC</td><td></td></tr> <tr><td></td><td>Not.Cred.</td><td></td></tr> <tr><td></td><td>Notice of Hrg</td><td>X</td></tr> <tr><td></td><td>Aff.Mail</td><td>X</td></tr> <tr><td></td><td>Aff.Pub.</td><td></td></tr> <tr><td></td><td>Sp.Ntc.</td><td></td></tr> <tr><td></td><td>Pers.Serv.</td><td>X</td></tr> <tr><td>✓</td><td>Conf. Screen</td><td></td></tr> <tr><td>✓</td><td>Letters</td><td></td></tr> <tr><td>✓</td><td>Duties/Supp</td><td></td></tr> <tr><td></td><td>Objections</td><td></td></tr> <tr><td></td><td>Video Receipt</td><td></td></tr> <tr><td></td><td>CI Report</td><td></td></tr> <tr><td></td><td>9202</td><td></td></tr> <tr><td>✓</td><td>Order</td><td></td></tr> <tr><td></td><td>Aff. Posting</td><td></td></tr> <tr><td></td><td>Status Rpt</td><td></td></tr> <tr><td>✓</td><td>UCCJEA</td><td></td></tr> <tr><td></td><td>Citation</td><td></td></tr> <tr><td></td><td>FTB Notice</td><td></td></tr> </table>	Cont. from				Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.			Notice of Hrg	X		Aff.Mail	X		Aff.Pub.			Sp.Ntc.			Pers.Serv.	X	✓	Conf. Screen		✓	Letters		✓	Duties/Supp			Objections			Video Receipt			CI Report			9202		✓	Order			Aff. Posting			Status Rpt		✓	UCCJEA			Citation			FTB Notice		<table border="1"> <tr><td><b>Reviewed by:</b> LEG</td></tr> <tr><td><b>Reviewed on:</b> 3/4/16</td></tr> <tr><td><b>Updates:</b></td></tr> <tr><td><b>Recommendation:</b></td></tr> <tr><td><b>File 23- Bernal</b></td></tr> </table>	<b>Reviewed by:</b> LEG	<b>Reviewed on:</b> 3/4/16	<b>Updates:</b>	<b>Recommendation:</b>	<b>File 23- Bernal</b>
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<b>Reviewed by:</b> LEG																																																																														
<b>Reviewed on:</b> 3/4/16																																																																														
<b>Updates:</b>																																																																														
<b>Recommendation:</b>																																																																														
<b>File 23- Bernal</b>																																																																														



## Petition for Probate of Will and Letters Testamentary

<b>DOD: 12/13/15</b>		<b>MARY STANDEN</b> , sister/named Executor without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>							
<b>Cont. from 021716</b>		Full IAEA – OK	<p><b>Note:</b> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> <li><b>Tuesday, August 9, 2016</b> for filing Inventory and Appraisal</li> <li><b>Tuesday, May 9, 2017</b> for filing the first account or petition for final distribution</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>							
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	s/p		<p>Will dated: 11/14/15</p> <p>Residence: Clovis</p> <p>Publication: The Business Journal</p> <p><b>Estimated Value of the Estate:</b></p> <table> <tr> <td>Personal property</td> <td>- \$150,000.00</td> </tr> <tr> <td>Real property</td> <td>- \$214,795.00</td> </tr> <tr> <td><b>Total</b></td> <td><b>- \$364,795.00</b></td> </tr> </table> <p><b>Probate Referee: Rick Smith</b></p>	Personal property	- \$150,000.00	Real property	- \$214,795.00	<b>Total</b>	<b>- \$364,795.00</b>
Personal property	- \$150,000.00									
Real property	- \$214,795.00									
<b>Total</b>	<b>- \$364,795.00</b>									
<input checked="" type="checkbox"/>	<b>Verified</b>									
<input type="checkbox"/>	<b>Inventory</b>									
<input type="checkbox"/>	<b>PTC</b>									
<input type="checkbox"/>	<b>Not.Cred.</b>									
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>									
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/								
<input type="checkbox"/>	<b>Aff.Pub.</b>									
<input type="checkbox"/>	<b>Sp.Ntc.</b>									
<input type="checkbox"/>	<b>Pers.Serv.</b>									
<input type="checkbox"/>	<b>Conf. Screen</b>									
<input checked="" type="checkbox"/>	<b>Letters</b>									
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>									
<input type="checkbox"/>	<b>Objections</b>									
<input type="checkbox"/>	<b>Video Receipt</b>									
<input type="checkbox"/>	<b>CI Report</b>									
<input type="checkbox"/>	<b>9202</b>									
<input checked="" type="checkbox"/>	<b>Order</b>									
<input type="checkbox"/>	<b>Aff. Posting</b>									
<input type="checkbox"/>	<b>Status Rpt</b>									
<input type="checkbox"/>	<b>UCCJEA</b>									
<input type="checkbox"/>	<b>Citation</b>									
<input type="checkbox"/>	<b>FTB Notice</b>									
			<p><b>Reviewed by:</b> JF/SEF</p> <p><b>Reviewed on:</b> 02/11/16</p> <p><b>Updates:</b> 3/2/2016</p> <p><b>Recommendation:</b> SUBMITTED</p> <p><b>File 24- Woods</b></p>							

<b>DOD: 02/21/2015</b>	<b>FREDERICK L. MITCHELL JR</b> , son is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	40 days since DOD	
<b>Cont. from</b>	No other proceedings	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	I&A: <b>\$135,000</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	(Real property in Fresno, CA)	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	Decedent died intestate	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Petitioner requests Court determination that decedent's 100% interest in the real property located at Fresno pass to him 100% pursuant to intestate succession.	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	W/	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		<b>Reviewed by:</b> SEF
<input type="checkbox"/> <b>Status Rpt</b>		<b>Reviewed on:</b> 3/2/2016
<input type="checkbox"/> <b>UCCJEA</b>		<b>Updates:</b>
<input type="checkbox"/> <b>Citation</b>		<b>Recommendation:</b> SUBMITTED
<input type="checkbox"/> <b>FTB Notice</b>		<b>File 25- Mitchell</b>

Petitioner Maria Cruz Almeraz Nava (Pro Per – Paternal Great-Grandmother – Petitioner)

## Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Minute Order 2/10/16:</u> Matter continued for service or due diligence as to the parents.  1. It appears the mother was served regarding the general hearing on 4/4/16 only, but not regarding this temporary petition and hearing. The Court may require further service.	
Cont. from 021016				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 3/3/16	
			Updates:	
			Recommendation:	
			File 26- Brown/ Haro	

Petitioner

Poarch, Natalie (Pro per – Maternal Aunt – Petitioner)

Petitioner

Poarch, Tiffeny (Pro per – Maternal Aunt – Petitioner)

## Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Minute Order 2/10/16:</u> Natasha Poarch, mother, represents that she was served paperwork. The petition is granted to 3/9/16 to preserve the status quo. The Court orders the Court Investigator to interview the minor, Petitioners, and the mother to make a recommendation to the Court as to whether or not the temporary orders should be extended to the general hearing.  As of 3/3/16, no report has yet been filed. The following issue now exists:  1. Notice of Hearing filed 2/10/16 is incomplete at Page 1 re what was filed and the proofs of service at Pages 2 and 3 do not contain the server's information. The Court may require further information or service.
Cont. from 021016			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 3/3/16	
		Updates:	
		Recommendation:	
		File 27- Fletcher	

Petitioner Shao-Lan Cheng Huang (Pro Per)  
 Petitioner Chien-Min Huang (Pro Per)

## Petition for Appointment of Probate Conservator

NO TEMPORARY REQUESTED		NEEDS/PROBLEMS/COMMENTS:
SHAO-LAN CHENG HUANG, mother, and CHIEN-MIN HUANG, father, are Petitioners.		
~Please see Petition for details~		
Court Investigator's Report was filed on 2/22/2013.		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input checked="" type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input checked="" type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
Reviewed by: LEG		
Reviewed on: 3/4/16		
Updates:		
Recommendation:		
File 28- Huang		